

Guidance from the Panel of Judges on completing Site Visit Issue Worksheets

IMPORTANT REMINDER: All Opportunity for Improvement (OFI) comments, double plus Strength comments, and all single plus Strength comments that link to Key Theme comments should be verified and clarified on site.

1. Develop an issue statement that is very clear relative to the feedback comment(s) you are trying to verify and/or clarify. Note the number of the comment associated with the specific questions listed to help you track the findings and conclusions to the comment.
2. Make sure the strategy block includes any documents that you need to review.
3. The strategy should include a list of people (by name, responsibility, or position) that you need to interview to address the issue. Use this information to develop an interview schedule for the applicant.
4. Include an opening question that you want to use with each person to get headed in the right direction being careful not to ask a yes/no or closed-ended question. Start with something like, "Please help me understand..."
5. Develop an overall list of questions that you want to ask each person being careful again not to ask yes/no or closed-ended questions. Write these questions in the strategy portion of the SVI worksheet. This list of questions will help you keep track during the interview to make sure you are focusing on pertinent information and not drifting off into areas that don't really resolve issues.
6. It is sometimes helpful to document on the SVI Worksheet the page number and/or specific figure number from the application that is the basis for the issue or question. This enables you to quickly refer back to the application and make sure that you know specifically what it is that you are trying to verify or clarify.
7. Include as part of your strategy any "all employee" or "all management" questions that need to be asked to check deployment at specific locations.
8. Identify any crossovers into other Items and/or Categories to ensure that the issue gets addressed by one of the other team members.

You want to limit the number of SVIs that you have to 2-4 per Item. You are responsible for resolving and documenting all of your SVIs during our time on site. Make sure you can accomplish your strategy plus those of your backup during the site visit. The key is to focus on the most significant issues and the information that is needed to verify a strength or clarify an OFI. Be careful not to include SVIs that may be nice to know but are not significant to the overall scoring of the application. The focus needs to be on the significant few.

If you have any questions while you prepare your initial SVI Worksheets, please ask your team leader, backup team leader or your Item/Category backup for help. Don't struggle in silence! Completing the initial SVI Worksheet should take you less than one hour per Item.